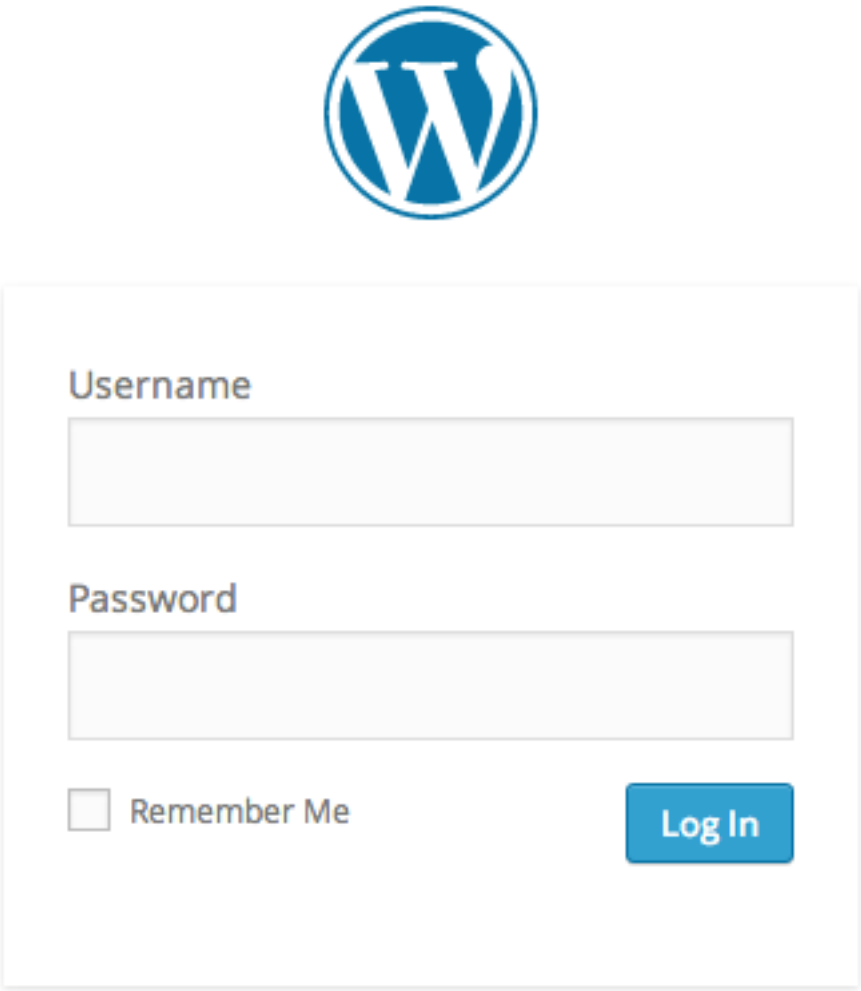
WordPress Editor User Manual

WordPress Editors Guide

A complete guide to Editors functions in WordPress



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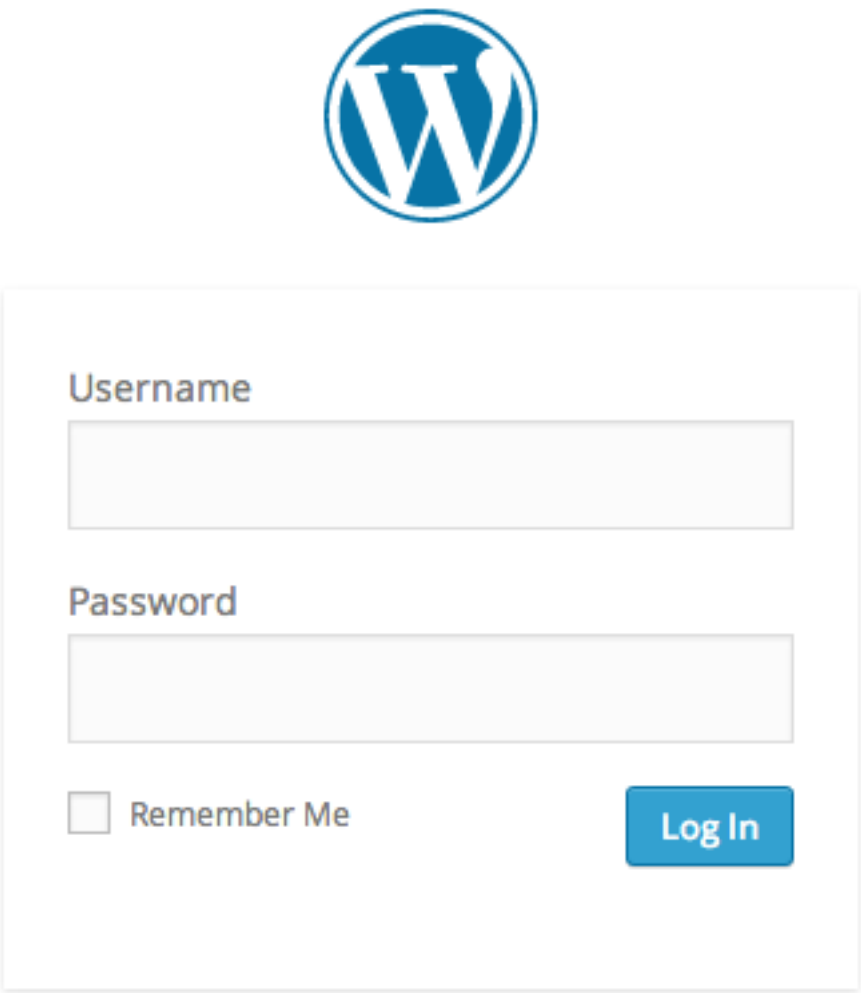
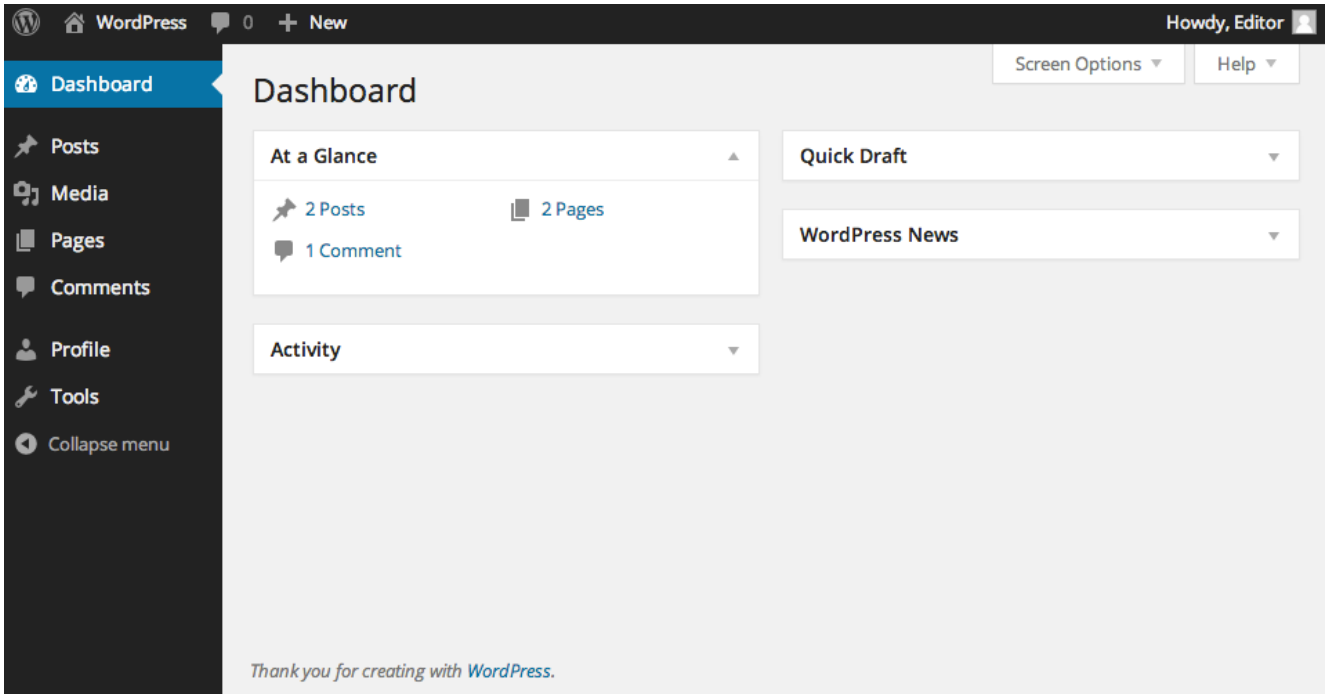
Quick Start

Login



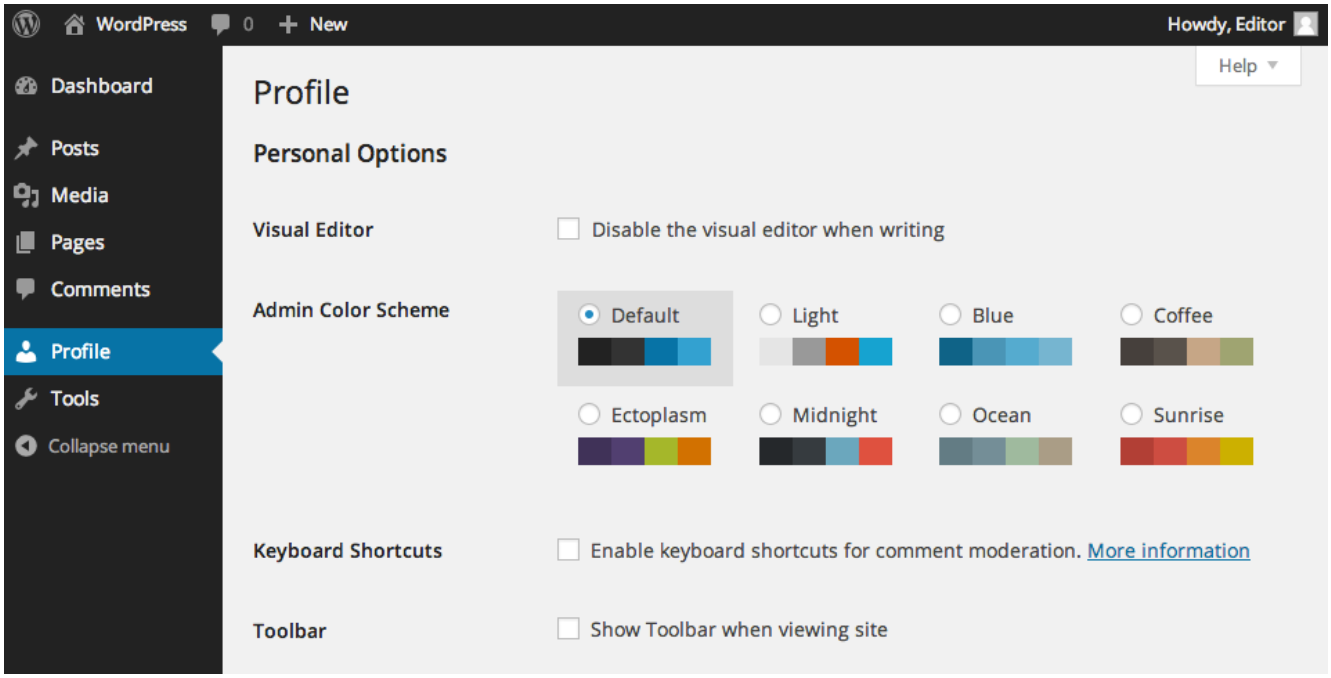
Enter your **Username** and **Password** as supplied by your web developer or IT Department to log in to the administration system.

Once you're in you will see the **Dashboard:**



The first thing you need to do is change your password to something more meaningful that you can remember. Click on **Profile** towards the left hand menu.

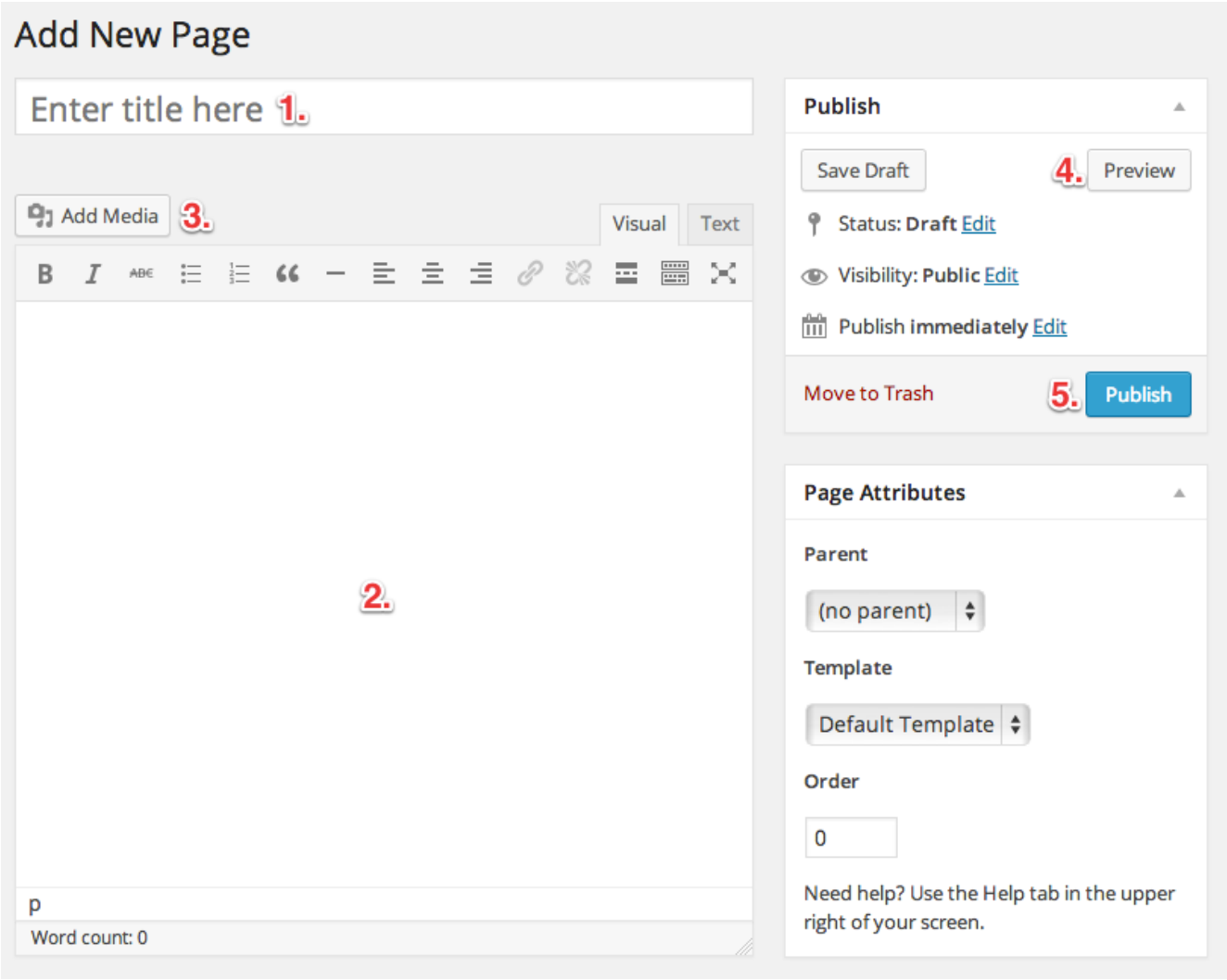
Profile



Here you can update any of your personal information, including your password, which is found at the bottom of this page. Click on the **Update Profile** button when you're done.

Now it's time to add some content or edit some existing content. If you are unsure whether you should be using **Pages** or **Posts,** read **Pages vs. Posts** in the Content section.

Edit/Add New Pages



1. The first field you need to fill in is the page title.
2. Then use the visual editor to enter the content for your page.

Hint: Click on the **Full Screen** button:

This allows you to edit your page in full screen mode, giving you greater control over your work area.

NB: Learn more about the *Full Screen Mode* or *Distraction-Free Writing* Mode at *The Editor* section in the next few chapters of the manual.

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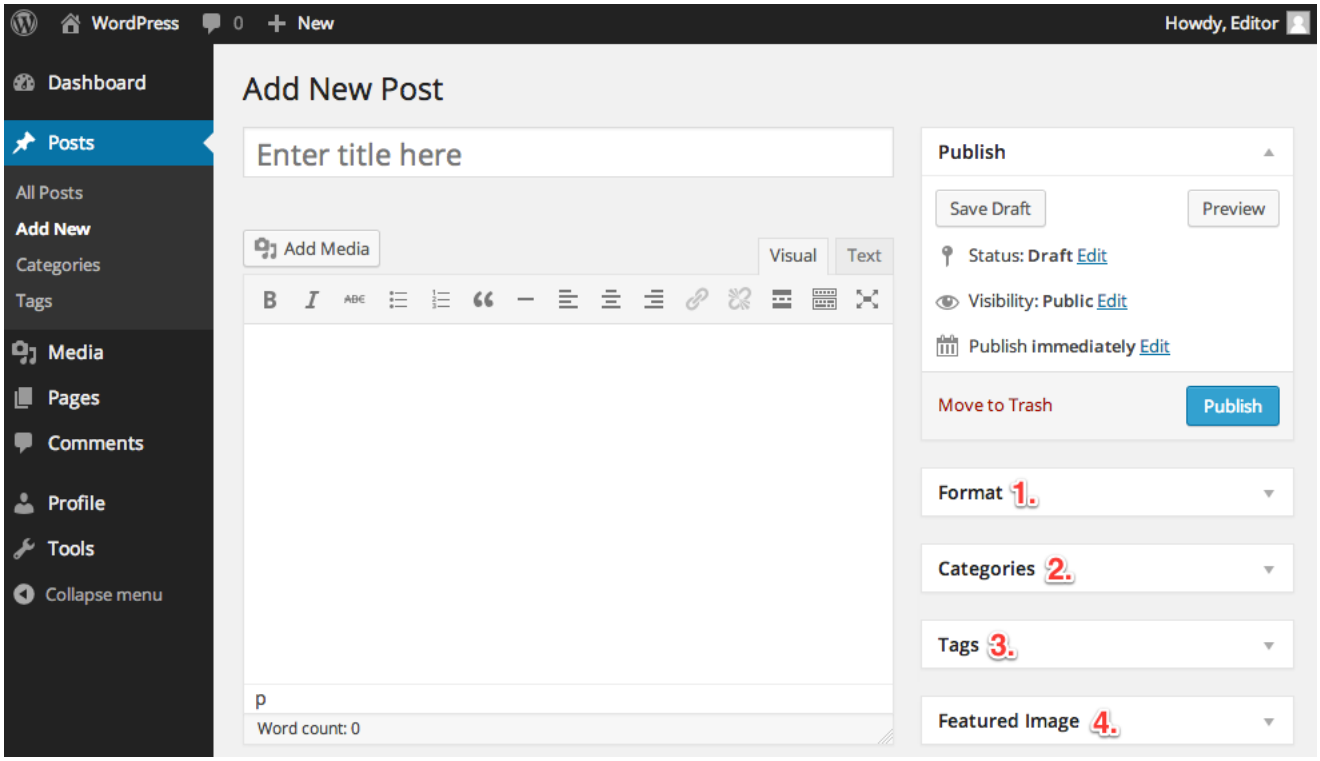
3. **Add Media** allows you to add media such as images, audio and video and assign titles and descriptions to media files. For more detailed information about this process, read the Media section in the Editors Guide.
4. When you are happy with your page, click on the **Preview** button found at the top right corner of the **Publish** module on the right hand side of the page. This will give a real life preview of how your page will look on your website.
5. Once you're happy for your page to go public, click on the **Publish** button at the bottom of the **Publish** module. If you are editing an existing page this button is called **Update**.

Edit/Add New Posts



Adding or Editing **Posts** functions much the same as **Pages**, however there are some additional information you need to enter.

1. You can change the presentation of your posts by setting up Format.
2. You will also need to assign the post to a category which will affect where and when the post appears on the website.
3. On the right hand side underneath the Categories module you can add Tags to your post. Tags are like keywords that visitors may use to search for related articles. For example, adding the tag "wedding" to a catering article and a photography article may help your visitors find related content on your website.
4. There is also an option to add a Featured Image to your post.

You can **preview and edit** posts in the same way as you do for pages. When you want to publish or save your changes click on the **Publish** or **Update** button.

Editors Guide

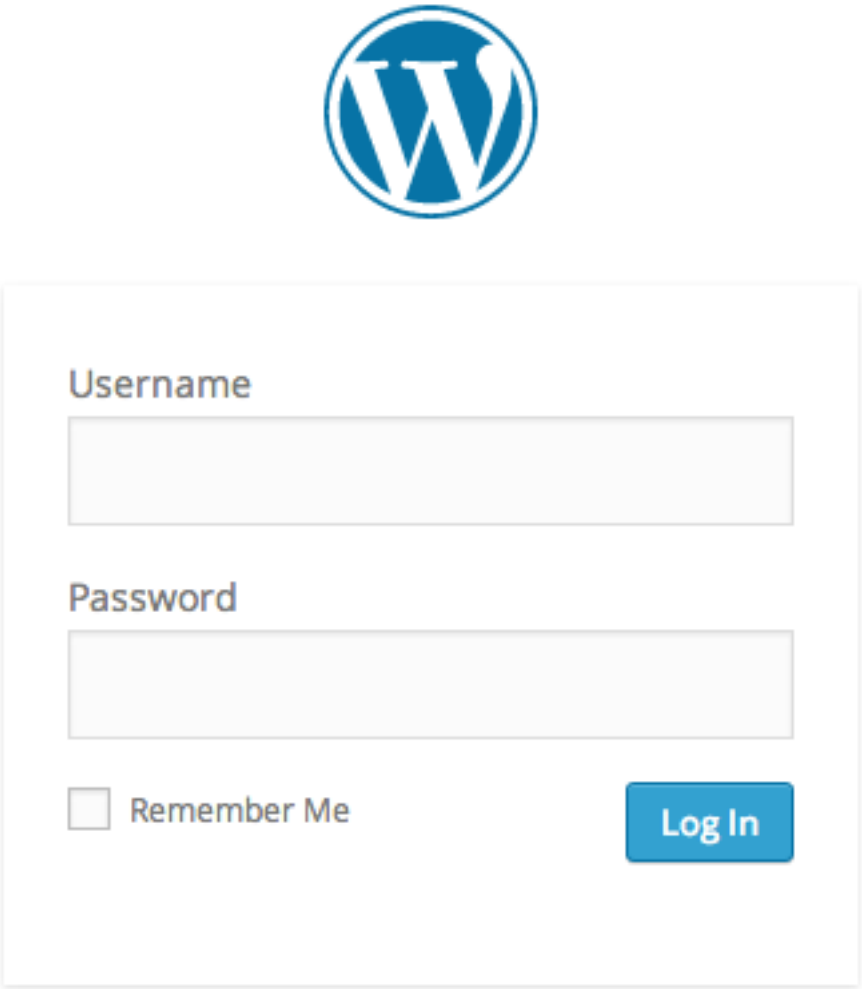
Welcome to the administration system that manages all of the content for your website. You have been made an Editor within the system, which means you have been granted access to create new content and edit existing content. This guide will walk you through the steps involved.

The first task you have to do is to log in to the system so you can make changes or add content.

Login

By now, you should have been given a **username** and a **password** by your developer or IT department.

The login screen looks like this:



Simply type your **username** into the field labeled “**Username**” and then click in the field labeled “**Password**” and enter your **password**.

Hint: You can also use the “**tab**” key on the keyboard to move into the “**Password**” field and make it active.

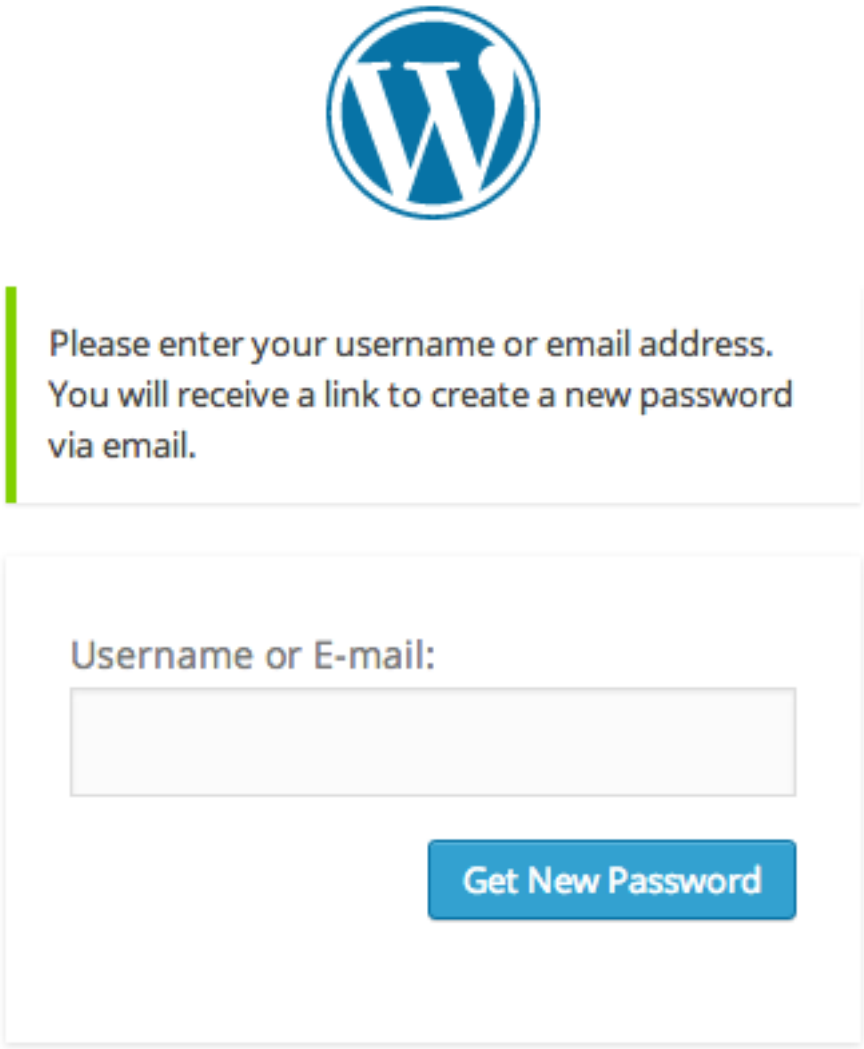
Take care to make sure the details you enter into both of these fields exactly match the details you have been supplied. The **username** is ***usually*** case-sensitive (meaning that uppercase and lowercase letters are different) and the **password** is ***always*** case-sensitive.

You can place a tick in the box labeled "**Remember Me**" and the system will attempt to remember you to save you having to enter these details next time.

Technical: These details will be stored in the system memory until you empty your internet browser's memory or clear your history. It doesn't matter if you don't understand this all, what is important is that if you tick this box it can save you time in the future.

Once you entered the correct details, click on the "**Log In**" button, or hit the "**enter**" key on your keyboard.

If you have forgotten your **password** click on the text that reads "**Lost your password?**" and you will be taken to this screen:


Please enter your username or email address. You will receive a link to create a new password via email.
Username or E-mail:
Get New Password

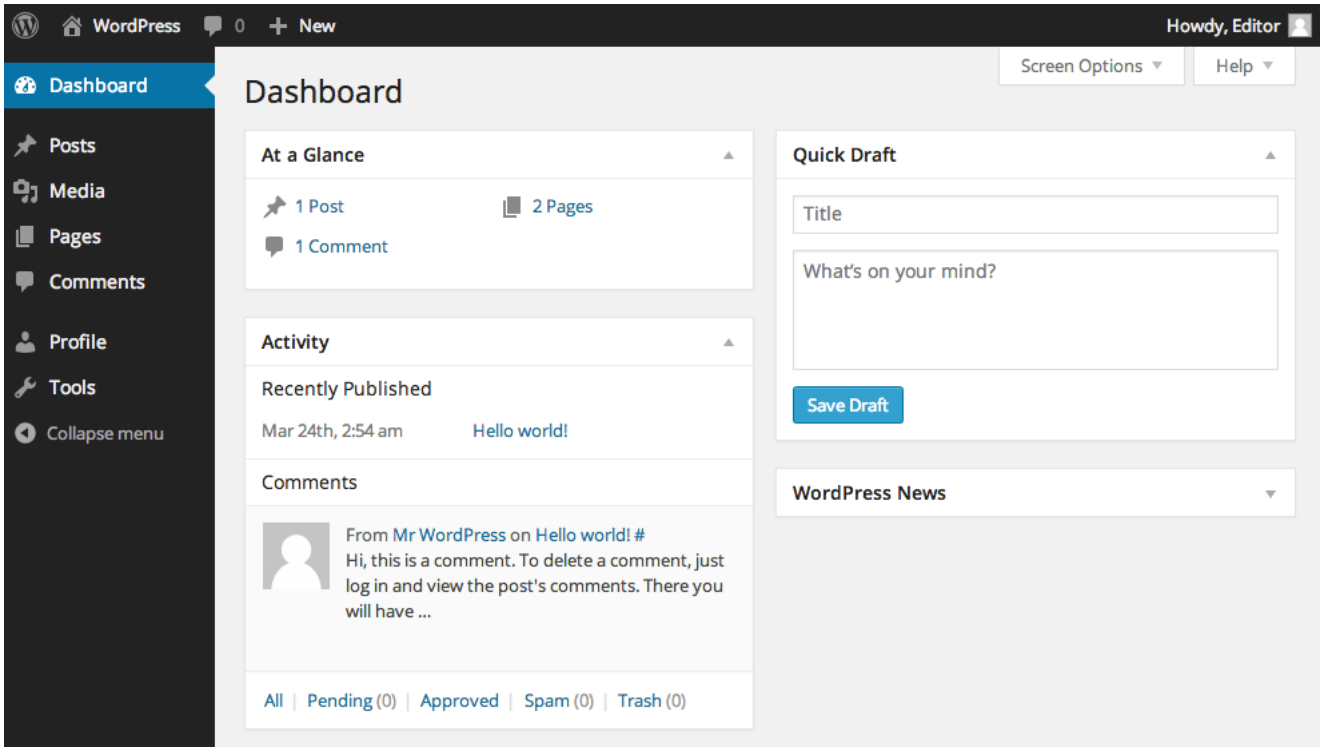
Type your **username** or **email** address into the field and click on the "**Get New Password**" button. A new **password** will be emailed to you.

Once you have your new **password**, login.

When you have logged in you will be taken to **The Dashboard**.

The Dashboard

The Dashboard screen, also considered the **home page** of the admin system, looks like this:



The Admin Window Explained

The Dashboard, along with all of the screens you will come across in the admin system, consists of the following four key elements:

- The Header
- The Sidebar
- The Editor
- The Footer

The Header

The header looks like this:

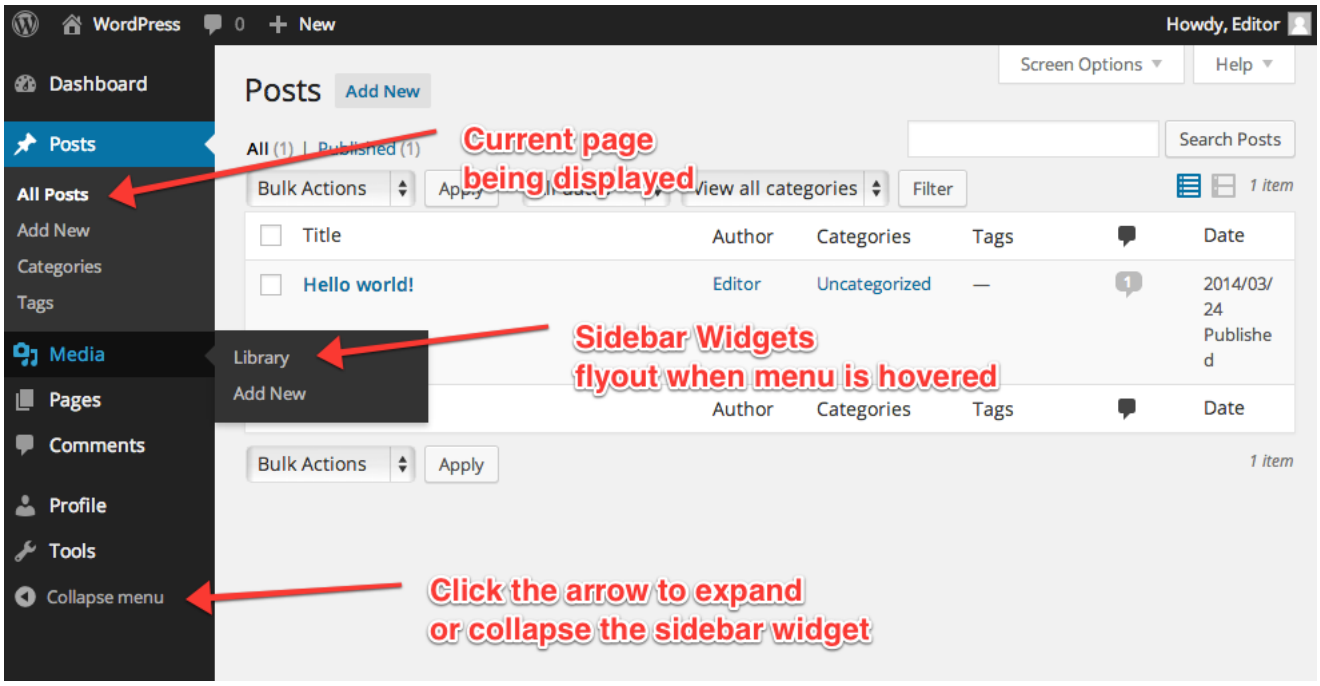
The header provides you with:

- A drop down list at:
  - **WordPress Logo** – that links you to WordPress information, documentation, forums and feedbacks.
  - To **visit** your website
  - For Adding New **Post**, **Media**, **Link** and **Page**
  - To the user currently logged – where in you can view his/her **avatar** if its available, **role** and a link to **Log Out** of the system
- And a link to the **Edit Comment** page.

These features will be explained in more detail later on.

The Sidebar

The sidebar looks like this:



The sidebar provides you with a comprehensive list of **tools** that allow us to perform **functions** in the admin system. Each set of tools is grouped into what we call "**widgets**".

Hint: Widgets like **Posts**, **Media**, **Links** and **Pages** has a drop down arrow in the top-right corner, which allows you to expand or collapse the widget.

You can also expand or collapse the entire sidebar by clicking on the **Collapse Menu**, which appears as the last link on the sidebar.

This is useful for saving space on your screen.

In order from top to bottom, our widgets are:

- The Dashboard
- Posts
  - All Posts
  - Add New
  - Categories
  - Tags
- Media
  - Library
  - Add New

- Pages
    - All Pages
    - Add New
- Comments

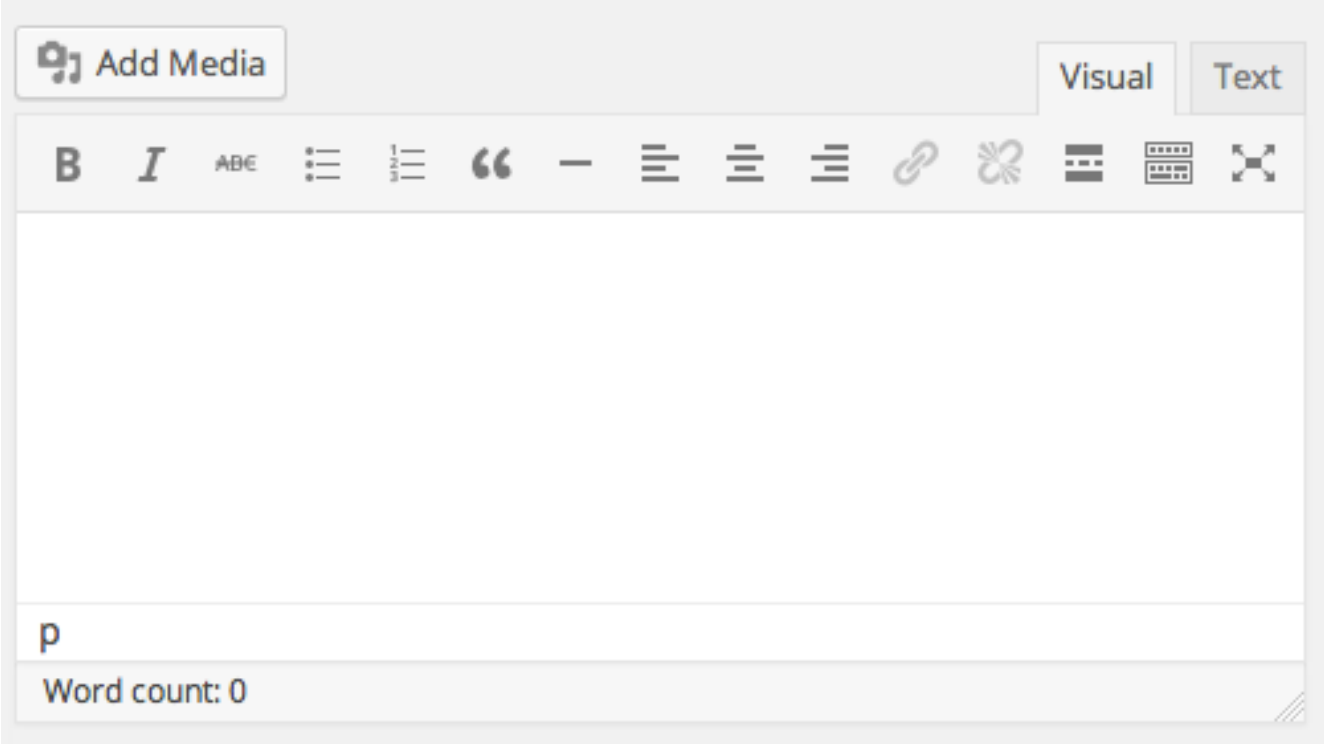
Profile

- Tools

Each of these tools will be explained in more detail later on.

The Editor

The editor looks like this:



The editor is where you add new content or change existing content in your website. The **modules** in the editor change according to which tool you are using form the sidebar.

On the dashboard screen there are seven modules:

In order from top to bottom, our modules are:

- Right Now
- Recent Comments
- Incoming Links
- Quick **Links**
- WordPress Blogs and
- Other WordPress News

Each of these modules will be explained in more detail later on.

Hint: Many modules within the admin system can be picked up and moved around in order for you to better manage your work area.

To move a module position, move the mouse over the grey bar at the top of the module until the mouse becomes a cross with arrows like this:

Then hold down the mouse button and move the module to its new location.

If a module is unable to be moved or cannot be moved to the location you chose, it will automatically return to its original position.

Modules can also be expanded and collapsed by clicking on the down arrow in the top-right corner of each module

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In the top-right corner of the editor you will find two buttons:

- Screen Options, and
- Help

If you click on the **Screen Options** button a module will slide open allowing you to hide or show any of the modules in the editor. This gives you greater control over your work area.

Clicking on the **Help** button will slide open the Help module and provide tips for the screen you are in.

Technical: This help module is designed more for developers and the IT department so more than likely you will not need it. All the help you need should

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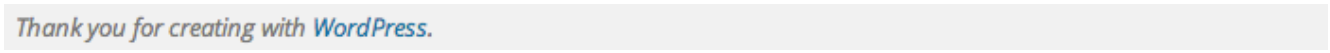
be right here in this user's guide.

The Footer

The footer looks like this:



The footer contains a link to the WordPress website and the version number of WordPress you are running. The footer also provides a visual cue for you that you are at the end of the page.

Dashboard Modules

At a Glance

The first module on the dashboard screen is called "**At a glance**" and provides you with a snapshot of the content in your website.

In the example there is **1 Post**, **5 Pages**, as well as **2 Comments**.

We'll cover each of these in more detail later on.

You'll notice that the information in this module also links to the relevant sections of the admin system. For example: **1 Page** links to the "**Edit Pages**" screen. This provides easy navigation between admin sections.

Technical: Themes, widgets and version upgrades are tasks assigned to administrators. As an editor, you are not able to make these changes.

Activity

The **Activity** module shows the most recent posts and pages that were published and also recent comments made by visitors to your website. If you position the mouse over a comment, a menu appears underneath it with the following options:

- **Unapprove**
- **Reply**
- **Edit**
- **Spam**
- **Trash**

There is also a **All** link to the Comments screen in the admin system where you can view all the comments that have been made.

We'll cover Comments in more detail later on.

Comments may not necessarily be enabled on your website. If they are not enabled then just ignore the **Recent Comments** module.

Quick Draft

The **Quick Draft** module allows you to quick note down any ideas you have for a post directly on the dashboard.

This will make sense once you have read the Add New Post section. Just know that this is a handy tool for quickly jotting down ideas while they are fresh and before you lose your train of thought.

WordPress News

The **WordPress News** displays recent entries by WordPress developers about the general ongoing evolution of the WordPress platform. This may or may not interest you.

For day-to-day use, you could safely turn off the **WordPress Blog** and **Other WordPress News** modules by clicking on the **Screen Options** button in the top-right corner and un-ticking the appropriate boxes.

Admin Bar

If you enable the admin bar in your profile you will see the **Admin Bar** as a solid black bar that appears at the top of the page. The admin bar can be switched on or off on the "live" website in your profile settings.

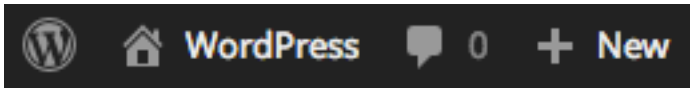
Starting from the left, the admin bar contains a small **WordPress logo** drop down menu, which contains links to **WordPress updates**, **WordPress site**, **documentation**, **support forums** and **feedbacks**. Then, a link to the **dashboard**, a link to **Edit Comments** an **Add New** dropdown menu for **Post**, **Media**, **Link** and **Page.**

Across the right most part of the admin bar contains a **small picture** (avatar) of whoever is logged into the site. Following the avatar is the **username** of the person logged in and **Search** icon that toggles to being the **Search box** once clicked.

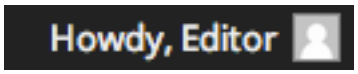
The username is a dropdown list, which consists of:

- **Edit My Profile** - a link to Profile page.
- **Log Out** - a quick way to log out your admin control.

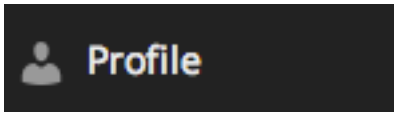
The Admin Bar's left panel looks like this:



The right side of the Admin Bar looks like this:

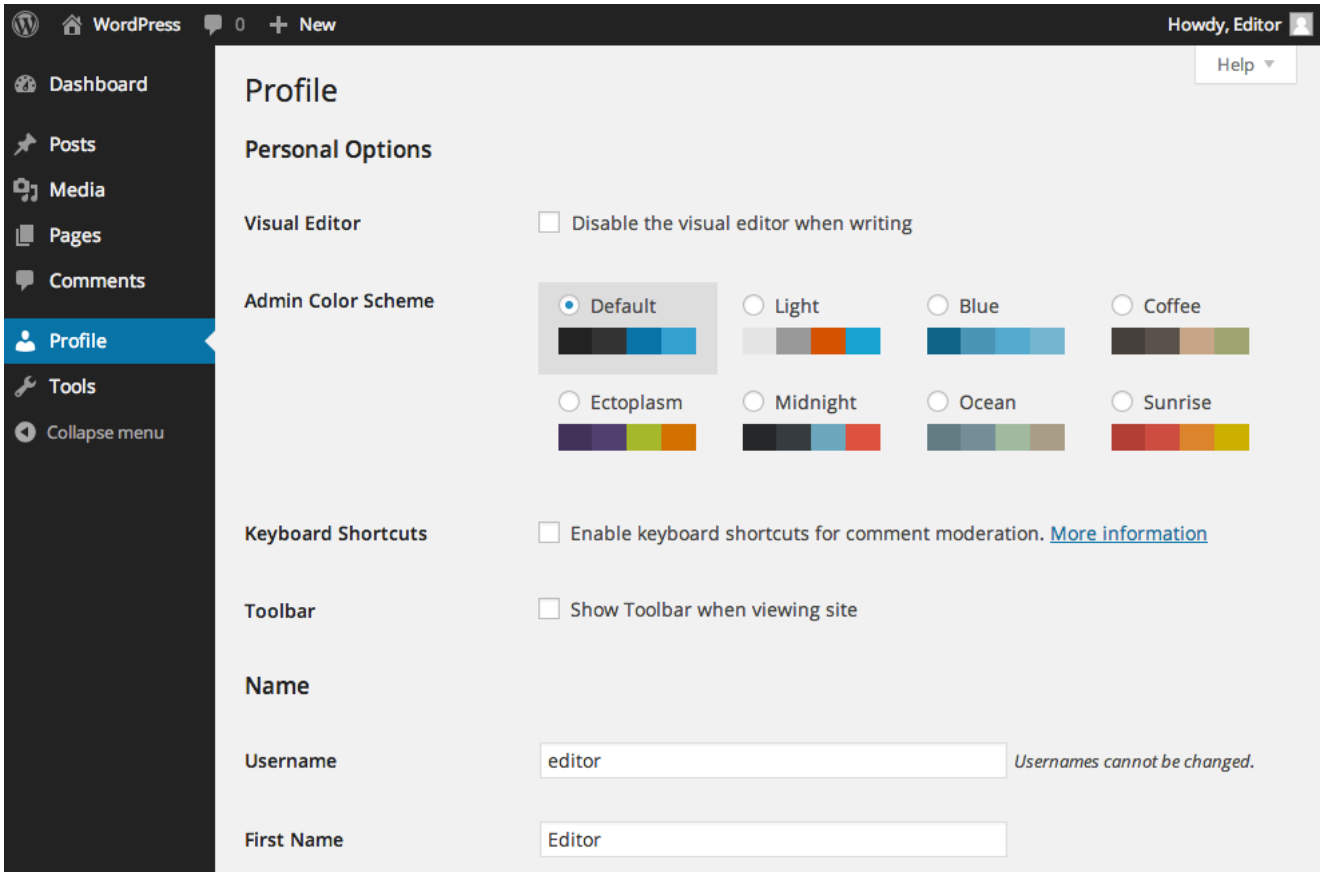


Profile



You can access your profile by clicking on the **Profile** widget in the sidebar or clicking on your username next to the word "**Howdy**" in the header. This "Howdy" reference is a way of letting you know that you are logged in under your username. Some admin systems may have multiple users logged in at once so this is a useful tool for making sure you are logged in correctly.

The Profile screen looks like this:



In the Profile screen you can change your personal options, name and contact information.

Personal Options

The **Visual Editor** is what you will use when writing or editing posts and pages in the website. Disabling the visual editor means you will only be able to write posts and pages using html and will have no visual representation of the content you're working with.

Caution: It is recommended that you **do not tick this box** unless you are an experienced html programmer and are familiar with WordPress.